



Alabama
Forever Wild Land Trust
Annual Report
Fiscal Year 2009-2010

STATE OF ALABAMA
FOREVER WILD
LAND TRUST

**64 NORTH UNION STREET, SUITE 464,
FOLSOM ADMINISTRATIVE BUILDING
MONTGOMERY, ALABAMA 36130**

Robert Bentley
Governor

TELEPHONE (334) 242-3484 FACSIMILE (334) 242-0999

N. Gunter Guy, Jr.
Chairman

January 31, 2011

Governor Robert Bentley
The Capitol
Montgomery, Alabama 36130

Lt. Governor Kay Ivey
The State House - Room 725
Montgomery, Alabama 36130

Speaker of the House Mike Hubbard
The State House
Montgomery, Alabama 36130

Re: Forever Wild Land Trust Annual Report - FY 2009-2010

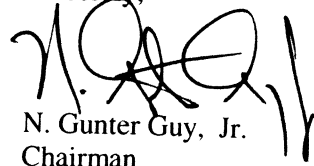
Dear Governor Bentley, Lt. Governor Ivey, and Speaker Hubbard:

Pursuant to the provisions of Amendment 543, *Constitution of Alabama of 1901*, Section 5(d), and on behalf of the Forever Wild Board of Trustees, it is my pleasure to transmit herewith the annual report of the Alabama Forever Wild Land Trust for the fiscal year October 1, 2009 through September 30, 2010.

During this period the Forever Wild Land Trust approved acquisition of eleven tracts comprising 77,583 acres. The acquisitions include: Mulberry Fork WMA-33,280 acres in Jefferson and Walker Counties; Cahaba River WMA-27,894 acres in Bibb and Shelby Counties; Yates Lake West Tract-3,518 acres in Elmore County; Barbour WMA-RMACK Tract Additions-3,866 acres in Barbour and Bullock Counties; Red Hills Tract-2,590 acres in Monroe County; Walls of Jericho Sims, Swaim and Johnson Additions-535 acres Jackson County; Lauderdale WMA-Shaw Hollow and Pea Ridge Additions-327 acres Lauderdale County; Coon Gulf-Glawson Tract-3,225 acres Jackson County; Tannehill Land and Ridges Tract-553 acres in Jefferson and Bibb Counties; MSP-Flat Rock Addition-8.8 acres in Madison County; and Red Hills Hancock/CFS Addition-1,786 acres Monroe County.

During fiscal year 2010-2011 the Board will continue identifying and purchasing tracts of land for nature preserves, additions to state parks, outdoor recreational areas and wildlife management areas for public hunting.

Sincerely,


N. Gunter Guy, Jr.
Chairman

**ALABAMA
FOREVER WILD LAND TRUST
ANNUAL REPORT
Fiscal Year 2009-2010**

ALABAMA FOREVER WILD LAND TRUST
ANNUAL REPORT
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GENERAL INFORMATION

Amendment 543 of the *Constitution of Alabama of 1901* established the Forever Wild Land Trust and the Board of Trustees of the Forever Wild Land Trust. The enabling law provides for an annual report for the previous fiscal year to be delivered to the Governor and state legislature on or before February 1 of each year. The report details the activities of the Board for the previous fiscal year. This report is for the fiscal year October 1, 2009 through September 30, 2010.

BOARD OF TRUSTEES

The Commissioner of the Department of Conservation and Natural Resources, served as ex officio Chairman of the fifteen member Board of Trustees (Board) of the Alabama Forever Wild Land Trust. The Board also includes two (2) other ex officio members, three (3) members appointed by the Alabama Commission on Higher Education (ACHE) and, three (3) members each appointed by the Governor, Lieutenant Governor, and the Speaker of the House.

The following comprises the membership of the Board for fiscal year 2009-2010:

M. Barnett Lawley

ex-officio Chairman

Commissioner

**Alabama Dept. of Conservation and Natural Resources
64 North Union Street, Suite 468
Montgomery, AL 36130**

Linda S. Casey

ex-officio member

State Forester

**Alabama Forestry Commission
513 Madison Avenue
Montgomery, AL 36130**

George Crozier, Ph.D

ex-officio member

Executive Director

**Marine Environmental Sciences Consortium
Post Office Box 369-370
Dauphin Island, AL 36528**

A.F. Schlundt, Ph.D

**Appointee by the Alabama Commission on Higher
Education (representing the Southern District)
Term expires September 30, 2013**

**Educator
Faulkner University, Montgomery
5345 Atlanta Highway
Montgomery, AL 36109**

Robert O. Lawton, Ph.D

**Appointee by the Alabama Commission on Higher
Education (representing the Northern District)
Term expires September 30, 2015**

**Educator
University of Alabama in Huntsville
Shelby Center 369A
Huntsville, AL 35899**

Lawrence J. Davenport, Ph.D

**Appointee by the Alabama Commission on Higher
Education (representing the Central District)
Term expires September 30, 2011**

**Educator
Samford University
Department of Biology
800 Lakeshore Drive
Birmingham AL 35229**

Robert W. Taylor, Ph.D

**Appointee by Governor Riley (representing the Northern
District)
Term expires December 31, 2010**

**Educator
Alabama A & M University
School of Agriculture and Environmental Sciences
4900 Meridian St.
Normal, AL 35762**

George Barber

**Appointee by Governor Riley (representing the Central
District)
Term expires December 31, 2012**

**Businessman
27 Iverness Court Parkway
Birmingham, AL 35242**

Angus R. Cooper, III

Appointee by Governor Riley (representing the Southern District). Term expires December 31, 2014.

**Businessman
207 Lanier Avenue
Mobile, AL 36607**

Raymond A. Keller

Appointee by Lt. Governor Folsom (representing the Northern District). Term expires December 31, 2015.

**Businessman
33613 U. S. Highway 72
Hollywood, Alabama 35752**

Lee Robertson Kuwica

**Appointee by Lt. Governor Baxley (representing the Central District).
Term expires December 31, 2010**

**Banker
218 Beech Street
Birmingham, AL 35213**

Everett Johnson

**Appointee by Lt. Governor Baxley (representing the Southern District)
Term expires December 31, 2012**

**Educator
13693 Pine Forest Road
Andalusia, AL 36420**

Richard D. Holland, Ph.D

Appointee by Speaker Hammett (representing the Central District). Term expires December 31, 2014.

**Educator
University of West Alabama
Station 1
Livingston, Alabama 35470**

James A. Yance

**Appointee by Speaker Hammett (representing the
Southern District)**

Term expires December 31, 2010

Attorney

1601 Dauphin Street

Mobile, AL 36604

John Woller

**Appointee by Speaker Hammett (representing the
Northern District)**

Term expires December 31, 2012

Businessman

2418 Surrey Lane, SE

Decatur, AL 35601

BOARD MEETINGS

The Board held four meetings during the 2009-2010 fiscal year. The first quarterly meeting was held December 3, 2009 at Troy University in Troy. The second meeting was February 4, 2010, at the State Archives and History Building in Montgomery. The third meeting was on June 17, 2010 at Faulkner University in Montgomery. The final meeting of the year was held September 16, 2010 at the Dauphin Island Sea Lab in Dauphin Island.

Each of the Board meetings was announced in advance through press releases and the Secretary of State's website inviting public attendance and participation. Public comment, as usual, was encouraged at each Board meeting. The proceedings of all meetings were recorded, transcribed and made available for public review.

PUBLIC PARTICIPATION & TRACT NOMINATIONS

The State Lands Division began receiving tract nominations for acquisition by the Forever Wild Land Trust with the passage of the law. The public is encouraged to nominate tracts for consideration by the Board. Nomination solicitation notices are periodically sent to all members of the legislature, all Board members, major newspapers and other interested parties. The only requirement for nominating land is that the nomination be made in writing. Thirty-six (36) nominations, approved for consideration by the landowners, are currently in various stages of consideration by the Board. The list of nominations is updated regularly by staff of the Alabama State Lands Division. Nominated tracts remain on the list until either withdrawn by the owner, purchased, or the State is unable to conclude a negotiated purchase. A current listing of the available nominated tracts is attached to this report as Appendix A.

The Alabama State Lands Division staff maintains a mailing list of individuals interested in Forever Wild matters in order to inform them of upcoming meetings.

BUDGET

The Forever Wild Trust Fund cumulative cash balance as of September 30, 2010 was \$7,027,336.91. Cumulative available capital spending authorization was \$4,288,185.41.

The cumulative Stewardship Trust Fund cash balance as of September 30, 2010 was \$24,066,371.75.

Summaries of the Forever Wild current fund balances, along with budgets for fiscal year 2009-2010 and 2010-2011 are included in Appendix B.

ACQUISITIONS

In Fiscal Year 2009-2010, the Board undertook ten (11) tract acquisitions of land totaling 77,583 acres. Each 2009-2010 acquisition by the Board is described below:

MULBERRY FORK WMA TRACT in Walker and Tuscaloosa County consists of a 94 year hunting lease for the entire 33,280 acre Wildlife Management Area. The tract is comprised of mountainous and wooded terrain, hosting springs, rocky bluffs as well as early successional habitats within reclaimed areas and plantation forests bordering the Bankhead Lake portion of the Black Warrior River. In partnership with Molpus Timberlands, the plantation timber is under a pre-existing 93 year lease arrangement with a third party.

CAHABA RIVER WMA TRACT in Shelby and Bibb County consists of a 94 year hunting lease for 70% of the Wildlife Management Area (27,894 acres). The tract is comprised of mountainous and wooded terrain, hosting springs, rocky bluffs as well as early successional habitats within reclaimed areas and plantation forests bordering the Cahaba River. In partnership with Molpus Timberlands, the plantation timber is under a pre-existing 93 year lease arrangement with a third party.

THE YATES LAKE-WEST TRACT in Elmore County consists of 3,518 acres of a pine-hardwood hills and creek valleys on the western shore of Yates Lake. Habitat components include longleaf pine stands and mature hardwood creek bottoms, as well as the protection of 3 miles of shoreline along the Tallapoosa River.

THE BARBOUR WMA -RMACK TRACT ADDITIONS in Barbour and Bullock County are a mix of pine and hardwood forest habitats. This 3,866 acre acquisition serves as a public land addition to the Barbour Wildlife Management Area, which is one of the largest and oldest state owned public hunting areas in Alabama.

THE RED HILLS TRACT in Monroe County is a wet ravine and upland pine forest site that includes 2,590 acres of crucial habitat for the federally listed red hills salamander, and many other rare species of plants and animals occupying these habitats. The tract was purchased in partnership with the Alabama Chapter of The Nature Conservancy, and in part through financial assistance from a \$2,790,000 U.S. Fish and Wildlife Service Endangered Species grant.

WALLS OF JERICHO SIMS, SWAIM, AND JOHNSON ADDITION in Jackson County consists of 535 acres adjoining the Skyline Wildlife Management Area. The tract is comprised of mountainous and wooded terrain, hosting caves, springs, rocky bluffs as well as grassy coves and riparian forests bordering Estill Fork, which is a principal tributary of the Paint Rock River. In partnership with the Alabama Chapter of The Nature Conservancy, the Alabama Forestry Commission, the Alabama Forest Resource Center and the Forever Wild Program, this tract was acquired in part through a \$640,000 U.S. Forest Service Forest Legacy grant.

THE LAUDERDALE WMA -SHAW HOLLOW AND PEA RIDGE TRACT ADDITIONS in Lauderdale County are a mix of pine and hardwood forest habitats. This 327 acre acquisition serves

as a public land addition to the Lauderdale Wildlife Management Area, which had been experiencing recent declines in acreage until Forever Wild's Southern Timber Venture purchase in 2001.

COON GULF-GLAWSON TRACT in Jackson County consists of 3,225 acres adjoining the TVA Raccoon Small Wild Area. The tract is comprised of mountainous and wooded terrain, hosting caves, springs, rocky bluffs as well as riparian forests bordering the Coon Gulf Cove of the Tennessee River. This tract has a pre-existing Conservation Easement recorded on it, which is monitored by partners within the Alabama Land Trust.

TANNEHILL LAND & RIDGES TRACT in Jefferson and Bibb County consists of 553 acres adjacent to Tannehill Ironworks Historic State Park. The tract is comprised of rolling hills and wooded terrain, hosting a variety of habitats bordering the Shades Creek, a primary tributary to the Cahaba River. The tract is cooperatively managed with the Tannehill Ironworks Historic State Park. The purchase of this tract included a charitable donation of the tract's value on the part of the seller.

MSP-FLAT ROCK ADDITION in Madison County consists of 8.8 acres of mountainous upland hardwood forest land on the Northern edge of Huntsville. The tract adjoins parcels owned by the City of Huntsville and was nominated in conjunction with the Land Trust of Huntsville and North Alabama. The tract hosts the Mountain Mist Trail which winds its way around Monte Sano Mountain. The tract is being managed as an addition to Monte Sano State Park.

THE RED HILLS HANCOCK/CFS ADDITION in Monroe County is a wet ravine and upland pine forest site that includes a mix of natural coastal plain habitats and pine-plantation forest situated on 1,786 acres of crucial habitat for the federally listed red hills salamander, and many other rare species of plants and animals occupying these habitats. The tract also offers recreation opportunities like hunting and bird watching. The tract was purchased in partnership with the Alabama Chapter of The Nature Conservancy, and in part through financial assistance from a \$1,850,000 U.S. Fish and Wildlife Service Endangered Species grant.

TRACT MANAGEMENT PLANS

The Forever Wild Constitutional Amendment requires that tract management plans be developed within 12 months of acquisition. These management plans are prepared by staff from the Alabama State Lands Division with assistance and cooperation from natural resource agency personnel, university staff members, environmental interest groups and citizens. The plans are developed in order to provide for management and maintenance of the property, protection of natural ecosystems, development of outdoor recreational opportunities, and implementation of natural resource education opportunities.

Alabama State Lands Division reviewed and prepared for the Board seven new tract management plans during this reporting period, which were approved by the Board. These plans addressed

management of the Old Cahaba Prairie Tract (Dallas County), Mulberry Fork WMA Tract (Walker and Tuscaloosa County), William R. Ireland Sr., Cahaba River WMA Tract (Shelby and Bibb County), Yates Lake-West Tract (Elmore County), Barbour WMA-RMACK addition (Barbour County), the Red Hills Tract (Monroe County) and Lauderdale WMA-Pea Ridge and Shaw Hollow additions (Lauderdale County).

SUPPORT OF FRIENDS OF FOREVER WILD

During fiscal year 2009-2010 the Department of Conservation and Natural Resources has run advertisement within the *Outdoor Alabama* magazine supporting the Forever Wild car tag.

PLANS FOR FISCAL YEAR 2010-2011

The Board will actively pursue the acquisition of a short list of high priority tracts identified and evaluated last year. The Board will also initiate tract assessments and evaluations for newly nominated tracts. Interests remain high in the re-authorization of Forever Wild land acquisition funding beyond the 2012 funding cycle. Efforts by supporters of the program will likely result in legislation being proposed during the legislative session.

FOREVER WILD PROGRAM

TRACT NOMINATIONS

Appendix A

Currently Active Forever Wild Nominations

Central District

NOMINATION NAME	ACRES	DATE
COUNTY: COOSA WEOGUFKA STATE FOREST ADDITION	762	12/3/2010
COUNTY: PICKENS PICKENSVILLE RIVER	2440	4/28/2010
COUNTY: TUSCALOOSA SIPSEY SWAMP-SVR ADDITION	40	10/1/2009

Northern District

NOMINATION NAME	ACRES	DATE
COUNTY: BLOUNT HALE CREEK SPRINGS	16	5/14/2009
RICKWOOD CAVERNS-HELMS	45	1/17/2008
COUNTY: CALHOUN COLDWATER MOUNTAIN-CASSIDY ADDITION	20	3/18/2008
COUNTY: CLAY CHEAHA SP-CASSIDY ADDITION	40	3/18/2008
COUNTY: FRANKLIN DISMALS CANYON ADDITION	213	11/30/2009
COUNTY: JACKSON COON GULF-BLUE HOLE ADDITION	120	8/24/2010
SKYLINE WMA-MCLAIN ADDITIONS	9	4/17/2008
STEVENS GAP CAVE	238	5/27/2009
COUNTY: MARSHALL CATHEDRAL CAVERNS-CEDAR WINDS ADDITION	10	2/16/2010
COUNTY: SHELBY CAHABA RIVER-SHELBY CO PARK ADDITION	495	7/20/2010
COUNTY: ST. CLAIR BIG CANOE CREEK PRESERVE	404	8/3/2009
BIG CANOE CREEK-BETTIS	197	4/22/2010
CHANDLER MOUNTAIN-AKERS	88	4/13/2005

Southern District

NOMINATION NAME	ACRES	DATE
COUNTY: BALDWIN MTD CLEARWATER-GLOBE CREEK ADDITION	160	10/26/2009
MTD-CLEARWATER ADDITION	10	5/2/2008
MTD-HAUL OVER ADDITION	426	5/5/2009
MTD-SHELLBANK RIVER #1 AND #2	5	10/30/2008
MTD-SIMMONS ADDITION	300	3/9/2010
PERDIDO RIVER-BARNHILL ADDITION	191	1/25/2010
WEEKS BAY-EAST FISH RIVER ADDITION	509	8/3/2009
WEEKS BAY-FISH RIVER GROVES ADDITION	165	8/3/2009

Currently Active Forever Wild Nominations

COUNTY: BARBOUR		
BARBOUR WMA-DIXON ADDITION	3100	5/18/2010
COUNTY: CLARKE		
BASSETT CREEK WETLANDS	238	3/10/2010
COUNTY: ESCAMBIA/COVINGTON		
CONECUH RIVER FLATS	2500	7/24/2007
COUNTY: MACON		
WHITE OAK PLANTATION	2800	2/15/2008
COUNTY: MARENGO		
SHADY GROVE	6214	4/3/2009
COUNTY: MOBILE		
ESCATAWPA RIVER-BENNET CREEK	768	2/9/2009
HERON BAY-KUPPERSMITH	595	2/9/2009
MTD-I-65 BORDER	41	2/5/2009
PORTERSVILLE BAY WETLANDS	520	1/29/2010
COUNTY: MONROE		
RED HILLS-FOUNTAIN	6134	5/27/2008
RED HILLS-SCRATCH ANKLE	1278	5/27/2008
COUNTY: PIKE		
PATSALIGA CREEK-NORTH ADDITION	315	11/24/2009

Appendix A

FOREVER WILD PROGRAM

BUDGET

Appendix B

FOREVER WILD FINANCIAL INFORMATION

FUND BALANCES - As of September 30, 2010

Cumulative Forever Wild Land Trust Cash Balance	\$7,027,336.91
Cumulative Stewardship Fund Cash Balance	\$24,066,371.75
Cumulative Capital Spending Authority	\$4,288,185.41

FOREVER WILD LAND TRUST FUND

Actual Expenditures for Fiscal Year 2009-2010

Beginning Balance	\$ 5,787,113.94
Revenue (including federal grants)	\$12,690,198.56
Non-Capital Expenditures	\$ 6,877,894.00
Capital Expenditures	<u>\$ 9,630,577.00</u>
Ending Balance	\$ 1,968,841.50

Budgeted Expenditures for Fiscal Year 2010-2011

Projected Beginning Balance	\$ 1,968,841.50
Revenues - Projected	\$15,270,000.00
Non-Capital Expenditures - Projected	\$ 7,674,240.00
Capital Expenditures - Projected	<u>\$ 8,177,697.00</u>
Ending Balance - Projected	\$ 1,386,904.50

FOREVER WILD - FINANCIAL INFORMATION
FOREVER WILD LAND TRUST FUND
Fiscal Year 2009-2010

REVENUE SOURCES

Interest Income - Alabama Trust Fund	\$ 10,139,379.44
Interest Income - Short Term Investment	\$ 15,642.91
Forever Wild Personalized Tags	\$ 221,091.69
Operating Contributions	\$ 0.00
Unrealized Gains - Alabama Trust Fund	\$ 0.00
Prior Year Refunds	\$ 0.00
Federal Pass Through Grants	\$ 0.00
Federal Funds	<u>\$ 2,314,084.52</u>
TOTAL REVENUES	\$ 12,690,198.56

EXPENDITURES*

Travel In-State	\$ 7,587.30
Professional Services	\$ 167,669.86
Supplies, Materials & Operating Expenses	<u>\$ 600.28</u>
	<u>\$ 175,857.44</u>
Transfers	
15% Stewardship transfers for land acquisitions	\$ 6,103,830.00
State Lands Division Administrative support	<u>\$ 425,000.00</u>
	<u>\$ 6,528,830.00</u>

Capital Outlay**

Cahaba River WMA Tract	\$ 2,482,700.86
Mulberry Fork WMA Tract	\$ 3,054,025.80
Barbour WMA-RMACK Addition	\$ 7,077,945.73
Yates Lake West Tract	\$ 8,826,979.29
Red Hills Tract	\$ 5,086,225.31
Walls of Jericho-Sims, Swaim, and Johnson Additions	\$ 945,500.00
Lauderdale WMA-Shaw Hollow and Pea Ridge Additions	\$ 400,246.18
Tannehill Land and Ridges	\$ 2,257,618.50
Coon Gulf-Glawson Tract	\$ 4,873,243.46
Monte Sano State Park-Flat Rock Addition	\$ 29,731.25
Red Hills-Hancock/CFS Addition	<u>\$ 3,525,678.86</u>
	<u>\$ 38,559,895.24</u>

TOTAL EXPENDITURES	\$ 45,264,582.68
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* Includes year end accounts payable and transfers for end of year acquisitions.

** Amounts include all associated costs such as taxes, appraisals, and recording fees.

FOREVER WILD - FINANCIAL INFORMATION
STEWARDSHIP FUND

	2007-2008	2008-2009	2009-2010
Actual Beginning Cash Balance	\$14,200,450.38	\$18,064,325.84	\$18,624,921.41
Non-Governmental Contributions	\$ 270.00	\$ 425.00	\$ 250.00
Court Ordered	\$ 0.00	\$ 4,000.00	\$ 0.00
Revenue - Interest Income*	\$ 462,872.89	\$ (38,474.47)	\$ 0.00
Transfers from FW Trust Fund	\$ 3,785,747.06	\$ 903,023.00	\$ 5,576,280.00
Non-Capital Expenditures**	\$ 385,014.49	\$ 308,377.96	\$ 444,287.00
Ending Cash Balance	\$18,064,325.84	\$18,624,921.41	\$23,757,164.41

* Fiscal Year 2008-2009 involved a change from Repo Account Investments to Short-Term Liquid Investments. Negative Interest Revenue amount is being researched to determine if this was an actual loss or if it was due to a Comprehensive Annual Financial Report (CAFR) adjustment entry error. Per 09/30/2010 Regions Bank Account Statement, FY 2009-2010 Income was \$471,135.03 and associated expenses incurred were \$12,061.45. These amounts will be reflected in FY2011 Accounting Year with a CAFR entry.

** FY 2009-2010 Non-Capital Expenditures amount includes \$10,500.00 in Accounts Payable and \$298,707.34 in outstanding Purchase orders.